



Process Document: Museum Transformations

Local history museums have traditionally presented artifacts and exhibits that tell the story of the community in which they are located. Today, some museums are recognizing that they have a larger role to play in their community and are re-thinking their mission and what they do. This sort of transformation has the potential to make a museum relevant to a community that has lost interest in it or no longer values what it has to offer. A community's loss of interest is often a result of a museum's inward focus or perception that it *should* have the community's support, and that the problem is the community's, not the museum's. When such a museum begins to look outward and consider what it can do for the community, rather than the other way around, a real transformation can take place.

This document provides a step-by-step guide to leading a museum through the process of managing transformative organizational change.

Both the board of directors and staff (whether paid or volunteer) should be involved in this process. You might recruit a committee or task force that represents both the board and staff, or (if the entire group is not too large) include everyone. The president of the board and executive director should lead this effort together.

All guidance contained in this document is based on best practices and case study examples. It is your responsibility to review and make sure you understand any applicable state or federal laws before beginning this process; please consult with a nonprofit attorney and/or accountant as needed.

1: Recognize the Need for Transformation

While not every museum that chooses transformation is faced with closure, it's likely that your museum is considering this option because you have realized your current path is unsustainable. Possibly the most difficult step in this process is recognizing and admitting that the museum must change in order to remain (or once again become) relevant. This requires both courage and humility on the part of board members and staff, and it is likely to be difficult for founders and others who are rightly proud of the work that they have done with the museum over the years.

This step begins with "recognition," but how do you recognize whether change is needed? Most people are uncomfortable with change; we prefer to keep things the way they are. Change introduces unknowns, risks, and the potential for failure as well as success, and people may be hesitant to suggest new ideas or admit that the

museum's current operation is not working as well as it could, particularly if founders or long-time staff or board members are involved.

To get past these potential obstacles, start with a data-gathering project focused on the community. You could ask whatever questions you want; the goal is to have data that can help start conversations about tough topics. Online tools such as SurveyMonkey offer limited free services to ask questions such as:

1. Have you heard of the museum? (yes, no, I don't know)
2. How would you describe what the museum has to offer? (open-ended question)
3. Have you ever visited the museum? (yes, no, I don't know)
If not, why not? (doesn't interest us, too busy doing other things, too expensive, not open at times that are convenient for us, etc.)
4. How often do you and your family usually go to museums? (never, one or two times a year, every other month, once a month or more often)
5. Do you ever go to the same museum more than once? (yes, no, I don't know)
6. If so, why? (changing exhibits, activities for our family, interesting presentations, etc.)
7. Are you a member of any museums? (yes, no, I don't know)
8. If you are a museum member, why did you join? (included or discounted admissions, extra benefits, because we wanted to support that museum, etc.)
9. How long have you lived in this community? (less than two years, 2-5 years, 6-10 years, more than 10 years)
10. How many people are in your family? (just me, two adults, one child, two children, three or more children)

You can promote a survey on social media sites, such as Facebook and NextDoor, that allow you to reach large numbers of people in your community for free. SurveyMonkey has helpful information about survey sample sizes that can help you calculate how many responses you need in order to be able to apply the results to the entire community.

With the survey results, you can start candid conversations with the rest of the museum board and staff that focuses on the data, rather than individuals or programs. For example, if most of your respondents are not museum-goers at all, you have a much different problem than if people in your community are regularly going to museums ... just not yours. The key to this step in the process is recognizing that you need to change *something* and that the problem does not lie with the community, but rather, with the museum and what it is offering the community.

It may be helpful to enlist the assistance of an experienced facilitator (who is not associated with the museum) to lead these discussions and appropriately manage defensive responses or contentious topics. This likely will not be a one-time conversation; expect to have multiple meetings on this topic to reach consensus.

To-Do List

Either on your own or with a committee:

- Talk to the board and staff about using a survey to gather data about the community's interest in and opinions about the museum.
- Clearly articulate the goal for the survey.
- Write questions that will meet that goal.
- Create a survey and determine how many responses you need.
- Promote the survey to the wider community on social media or through a partner's email list (such as your local library).
- Once you have enough responses, gather the data and analyze the responses.
- Determine what the survey data is telling you and prepare to present it.
- If necessary, find a facilitator to help present the results to the museum board and staff for discussion.
- Hold meetings about the survey results and use that as a jumping-off point for discussion about ways that the museum might improve.
- If possible, work to consensus that some change is needed, and document that consensus.

Note: You may work through this process without reaching a consensus that a truly transformative change is needed. If that is the case, any effort to transform the museum is unlikely to succeed until you can bring people around.

2: Explore the Possibilities for a New Path

If your museum board and staff have agreed that a transformative change is needed, your next task is to establish new goals. Rather than focus on what needs to change, it is helpful to first determine your target outcomes. If you are going on a journey, what is the desired destination? (If you don't know where you're going, how will you know when you've arrived?)

Some questions that you might ask yourselves include:

- **Who do we want to serve?** You might define this geographically (visitors to or residents of a certain area), demographically (adults, seniors, families with children, lower income people, non-native English speakers, etc.), psychographically (people with specific attitudes or opinions), or some combination of these.
- **What do they need that we could help provide?** This may require additional research on your part, if a specific need has not been documented already.
- **What can we realistically do?** Don't be afraid to set an ambitious overarching goal, as long as it can be broken down into smaller, achievable mini-goals.
- **How will we define success?** This is a very important, and often overlooked, part of the planning process.

This process may take you down several avenues of discussion. Perhaps some people on your board want to go in one direction, while others have a different idea. This is the time to hash out those differences, giving every idea equal consideration and respecting each person's viewpoint and opinions. You might end up with multiple options, and if that is the case, try to at least agree on how you would prioritize them.

To-Do List

Begin by selecting the individuals who will be part of this effort, if that does not include the entire organization. Once they are on board:

- Plan to hold regular meetings until you have completed this process. For example, you might establish a standing meeting date and time, such as every other Tuesday evening, for as long as is needed to complete this part of the process.
- Establish the ground rules at the very first meeting: Be positive, respect everyone's perspective, and consider each idea.
- Hold an initial brainstorming meeting, after which everyone looks for information to support the various ideas that the group decides to pursue.
- At subsequent meetings, work through the process of establishing new outcomes-based goals.
- If a committee did this work, present the prospective new goals to the entire organization for feedback and discussion. Be prepared to hear dissenting opinions and receive tough questions. Being challenged is a good thing. Have additional meetings, if time between is needed to gather the information you'll need to respond to questions or comments.

3: Make the Decision to Transform (or Not)

The goal-setting process, while essential, does not substitute for a conscious, clearly articulated group decision to pursue transformative change. The organization as a whole must make an explicit commitment to transform.

If most of your board or staff members are in favor of transformation, but a few are opposed, you should be prepared for the dissenters to leave the organization. If that is the case, it may be a deal breaker for everyone else, particularly if those opposed are founders. On the other hand, if the organization decides not to change, those who feel that change is absolutely necessary may not wish to continue their involvement.

Set aside a separate meeting to deal with only this topic. If the discussion could become contentious, you may want to have an objective facilitator lead it, with the goal of reaching consensus about whether the organization will or will not pursue the aspirational transformative changes that were identified during Task 2.

If the group decides to move forward, you'll go on to Task 4. If not, you may need to consider another Alternative Future. If anyone decides to leave the organization as a result of either outcome, be sure to make that departure as positive as possible.

To-Do List

This is an activity that requires courage and vision. Be kind to one another, and don't take anything personally.

- Prepare to present all of the findings and outcomes from Tasks 1 and 2, to show how the group has reached this point.
- If necessary, enlist a facilitator and help them prepare for the meeting with the information resulting from Tasks 1 and 2.
- Plan to hold a special called meeting of the board of directors, to which the staff is invited and encouraged to attend, to make this decision.
- Decide who will lead the meeting, make presentations, present the call to action, etc. Think through possible questions and challenges, and if possible, proactively build the answers into the presentation.
- At the outset of the meeting, establish the ground rules: be positive, respect the opinions of others, etc.
- Try to get to a solid decision by the end of the meeting.

4: Create a Plan to Guide Your Journey

Assuming that the organization has decided to move forward along the path to transformative change, your next step must be to figure out where you are now, where you want to go, and how to get there. You will need to involve stakeholders from the community to participate in this planning process. It will probably take a good deal of time to complete this Task.

The process can be most simply described as identifying the Goal conditions and the corresponding Current conditions, and then outlining a step-by-step path between each condition pair.

For example, if your organization has determined that few cultural institutions in your area offer activities for non-native English speakers, and your community has a growing population of Spanish-speaking people, you may have decided to make the museum more welcoming and relevant for that population. You might start by making a list of the Current conditions that could be obstacles to access, such as an English-only website, marketing materials, exhibit tags, docents, people who answer the phone, educational programs, etc. In addition, if your goal is that these neighbors will see themselves represented in the museum, and that is not currently the case, just making information available in Spanish would not be enough of a change.

Once you have identified your Goal conditions and corresponding Current conditions, you can start outlining the steps that will be required to get from Point A to Point B. This is likely to be an iterative process that involves a great deal of discussion, and possibly, some research. Start with a broad outline, and then try to be as specific as possible, particularly when considering questions such as, “What needs to happen before we can do the next thing?”

This plan will, when completed, allow you to determine how much time, money, and effort will be needed at each step along the way, which will feed into your plans for fundraising, scheduling, and staffing.

To-Do List

Be prepared for this part of the process to take some time, and resist the urge to rush through it. Also, give sufficient consideration to what stakeholders are telling you.

- Decide who needs to be involved in this activity, and invite/recruit them.
- Explain the process. Decide if the group will divide up the goals or work on each one collectively. In any case, it may be helpful to work through the first one as a group.
- Make a list of the Goal conditions and the corresponding Current conditions. Discuss these and revise the list until you’ve reached consensus that these are, in fact the Goal and Current conditions.
- If dividing up the work, decide how to do that, and then assign each condition pair to a person or a pair/group of people. It may be helpful to prioritize the condition pairs or work on the easiest pairs first.
- Once everyone has completed a step-by-step path for the first condition pair(s), go over that/those as a group and talk about the process. What worked well? What was difficult? What can you learn from one another? You may need to change your approach as you proceed with the rest of the condition pairs.
- After a draft step-by-step path has been completed for each of the Goal-Current condition pairs, review these as a group and make changes as needed.
- When you are all happy with your work, make sure each path is documented in writing and approved by the group. Then figure out how much time you think each step in each path is likely to take.
- If you have not already prioritized the Goals, do that now. You might decide that some Goals can be achieved easily, and so you want to do them right away. However, some Goals may require you to complete other Goals first. Come to an agreement on the order in which you want to tackle all of the Goals.
- Enlist one very organized person to take all of the Goal paths, as well as the order in which you will pursue each Goal, and create a master schedule for review, discussion, revision, and adoption.

- Use all of the previously approved information to develop and approve a budget; if necessary, a fundraising strategy; and a “staffing” plan that includes paid staff, board members, partners, and/or volunteers needed to achieve each Goal.

5: Implement the Plan

After you have a step-by-step plan, master schedule, budget, etc., you can start to break it down by year. Decide what you will do on a yearly basis until the plan is complete. In some cases, you might say that you will do Goal A as soon as you have raised enough money, which means that you will have to fundraise for Goal A sooner rather than later.

To-Do List

To implement your plan:

- Create a year-by-year guide for implementation.
- Try to complete one easy Goal and part of one difficult Goal each year, so that you are always making progress on the difficult Goals.
- Assign responsibilities to specific individuals, ensuring that no one is overloaded, and make sure that everyone knows how their role will enable the organization to meet its goals.
- Regularly check in with everyone on the team; if someone is struggling and needs help, rally reinforcements to give them a hand.
- When you hit your targets and complete your Goals, celebrate those achievements!

6: Build in Opportunities for Reflection and Course Correction

Although we all would like to believe that we are terrific planners, no one can anticipate every potential obstacle or problem. Economic factors, legislative decisions, natural disasters, and other issues can derail our plans or cause us to take a step back and re-assess our goals.

Build into your schedule at least one opportunity each year for all staff, board members, and stakeholders to provide their feedback on your journey so far and how it is going. Use a survey (preferably by an outside individual) to ensure that all feedback will be anonymous; this will encourage everyone to be candid and honest.

After the survey results are compiled (again, preferably by an outside individual), gather everyone together to review and discuss the results, and decide if any of your plans need to be adjusted accordingly. For example, if an approach has not been favorably received, you should consider why and make the appropriate changes.

Examples:

The Strong Museum of Play (Rochester, New York) began with the extensive collection of Margaret Woodbury Strong, whose will stipulated that her \$80 million estate should be used to establish a museum (or distributed to other museums). Strong had specialized in collecting toys, dolls, and an assortment of other items. Despite recommendations to focus on “children, play, imagination, and fun,” the initial board of directors decided instead to create a museum devoted to the Industrial Revolution and manufacturing’s transformation of American society. The museum was inarguably well done, but community support waned dramatically over its first 20 years. In 1985, a new executive director led the Strong Museum’s transformation into the National Museum of Play, following Rochester community-based market research that led them to focus on families with young children, which made up the vast majority of their audience. As a result, attendance more than doubled, and the Strong Museum is recognized as a leader in the museum community. In 2018–2020, the Strong aims to transform the surrounding area into “The Neighborhood of Play,” a “walkable green space to live, work, and play” that will a family-friendly hotel, mixed-rate rental housing, and retail shops. Learn more here: https://www.museumofplay.org/sites/default/files/uploads/Summer2018-Newsletter_o.pdf

The Discovery Museum (Acton, Massachusetts) previously consisted of a Victorian house with programs “best suited for preschoolers” and a small science-based museum for older children. The reimagined museum combines the best elements of both spaces into a new building that is complemented by an outdoor Discovery Woods space with swings, rope ladders, and a treehouse for crafts. The entire facility (including the outdoor playspaces) has been designed to be completely accessible, and the Museum’s mission now includes “Access for All: Open Door Connections,” which strives “to never turn away an individual or group for any reason, and to partner with community organizations to seek out underserved audiences and find ways to help them access the museum and our programs.” The Museum sets (and exceeds) an annual goal for the number of people the Museum will serve “free or at a deeply reduced cost with programs, events, or special discounts aimed at reducing roadblocks to visiting.” Special free programs are aimed at children on the autism spectrum, with hearing loss, or with vision loss. These programs have garnered significant, broad community support from foundations, corporations, and other nonprofit partners.

<https://www.discoveryacton.org/about/access-all-open-door-connections>

The Penn Museum (University of Pennsylvania Museum of Archeology and Anthropology, Philadelphia, Pennsylvania) was founded in 1887 to “embody the history of humanity.” Its *Building Transformation* project, which began in 2017, is literally transforming its physical space through an extensive renovation project, while also creating the capacity for presenting the collections in a “a dramatically

different and relevant way.” For example, the 2016 Public Classroom series on Race and Science utilized the Morton Collection of human skulls as a catalyst for engaging the public in a discussion on race and science. Samuel George Morton collected and studied the skulls in the 18th century as a basis for justifying racial inequality, while the live-streamed Public Classroom series assembled more than 25 experts who led the audience in examining their own beliefs about race, science, and justice. Over the first eight months, an estimated 10,000 people viewed videos of the classes online. A short documentary film about the project was subsequently presented at a “When Museums Tackle Tough Topics: Race, Science, and the Penn Museum” event in May 2017. A website with reading materials and other online resources, including age-appropriate teaching tools for younger children, were distributed free of charge to schools, community centers, other museums, and universities.

<https://www.penn.museum/sites/pmclassroom/>

For More Information:

The planning process outlined in this document was developed by Steph McDougal, McDoux Preservation LLC, and is provided here with permission.

For more information about the Strong Museum’s transformation, see *An American Association for State and Local History Guide to Making Public History*, Bob Beatty, ed., “Chapter 3: Discovering the Power of Transformation” (Lanham, Maryland: Rowman & Littlefield, 2017), 27–33.

In addition, various models for “change management” in organizations have been tested and proven over the past several decades. One oft-cited source is Dr. John Kotter, whose research and methodology (including a free e-book) are available online here: <https://www.kotterinc.com/8-steps-process-for-leading-change/>.